Federal Acquisition Service

Client Order Information (COI)

GSA Training Module for IWAC Region

COI Training Module Overview

Objective: This training module will take you step-by-step through the Client Order Information (COI) document in the Regional Business Application (RBA) IT-Solutions Shop (ITSS) component, specifically for the IWAC region.

Navigation: If the tutorial opens up in your web browser, simply click your mouse or your space bar to advance to the next slide. Use the "Backspace" key to go back. If the tutorial opens in the PowerPoint application, click on "F5" to view the tutorial. Use the spacebar or click your mouse to advance to the next slide. To go back, click on the "Backspace" key.

COI Glossary

Term	Definition
CO	Contracting Officer
Commodities	An order for hardware, software, may also include installation.
CSR	Customer Service Representative. GSA representative who acts as the primary liaison between the client and the contractors. CSRs are typically responsible for processing orders, with the exception of signing purchase orders.
FAST	Orders that provide commodities.
FFP	Firm Fixed Price - A task in which one price covers all costs.
FISSP	The program type of orders that provide services, generally IT.
FM	Fund Manager
Furniture	The program type of orders that provide furniture.
Order ID	The Order ID is used to identify the order throughout the RBA. Orders for the IWAC Region should follow the standard naming convention by entering the Requisition Number from FSS-Online into the Order ID field.
Peer Access List	Includes members of the same registered organization as the primary client, with limited access to the order.
Project (time & materials)	A task where government only pays for time spent on services and materials used.
Region	Defaults to the primary region of the GSA representative creating the COI.

COI Privileges

User Role | Action	Create	Edit	View
GSA User	✔	✔	✔
Client			✔
Contractor			✔*

*Contractors may view if they are on the BOMSOW Contractor List

IT-Solutions Shop

GSA

You are signed in as CSR1 IWAC

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WELCOME	ORDERS	FUNDING	REGISTRATION	CONTRACTS

Select a View:

| <<-- View Orders -->> ▼ | <<-- View Inactive Orders -->> ▼ | <<-- View Action Items -->> ▼ | <<-- View Support Information -->> ▼ |

Go to a Specific View Item: [_____] [Go] Create New Order

Orders - Entire Package

Click on the COI link in the Order Package view to open an existing COI in view mode. Only one COI document exists per order.

Next -> |

▼ Order Package

  ▼ REQUISITION005-COI Jamie Client (Test Organization) Award Notice Issued>>ROB

    00 Chronology

    ▼ 01 BOM/SOW REQUISITION005 - 00 Amendment 00 AWARD NOTICE ISSUED

      ▼ RFQ Modification 00 Amendment 00 Revision 00 GSA APPROVED

        Quote Amd 00 Rev 00 for Jim Contractor (TEST COMPANY CORP INC) Cnt# 263-97-D-0313, BID=$883,500.00

        Quote Amd 00 Rev 00 for William Vendor (ACME CORPORATION)   Cnt# GS-02F-0154R, BID=$925,000.00

        Quote Amd 00 Rev 00 for Patricia Partner (COMPANY ASSOCIATED) Cnt# GS-35F-0390K, BID=$900,000.00

        *Market Analysis Amendment 00 - Quote Selected: Jim Contractor - TEST COMPANY CORP INC (263-97-D-0313), $927,675.00
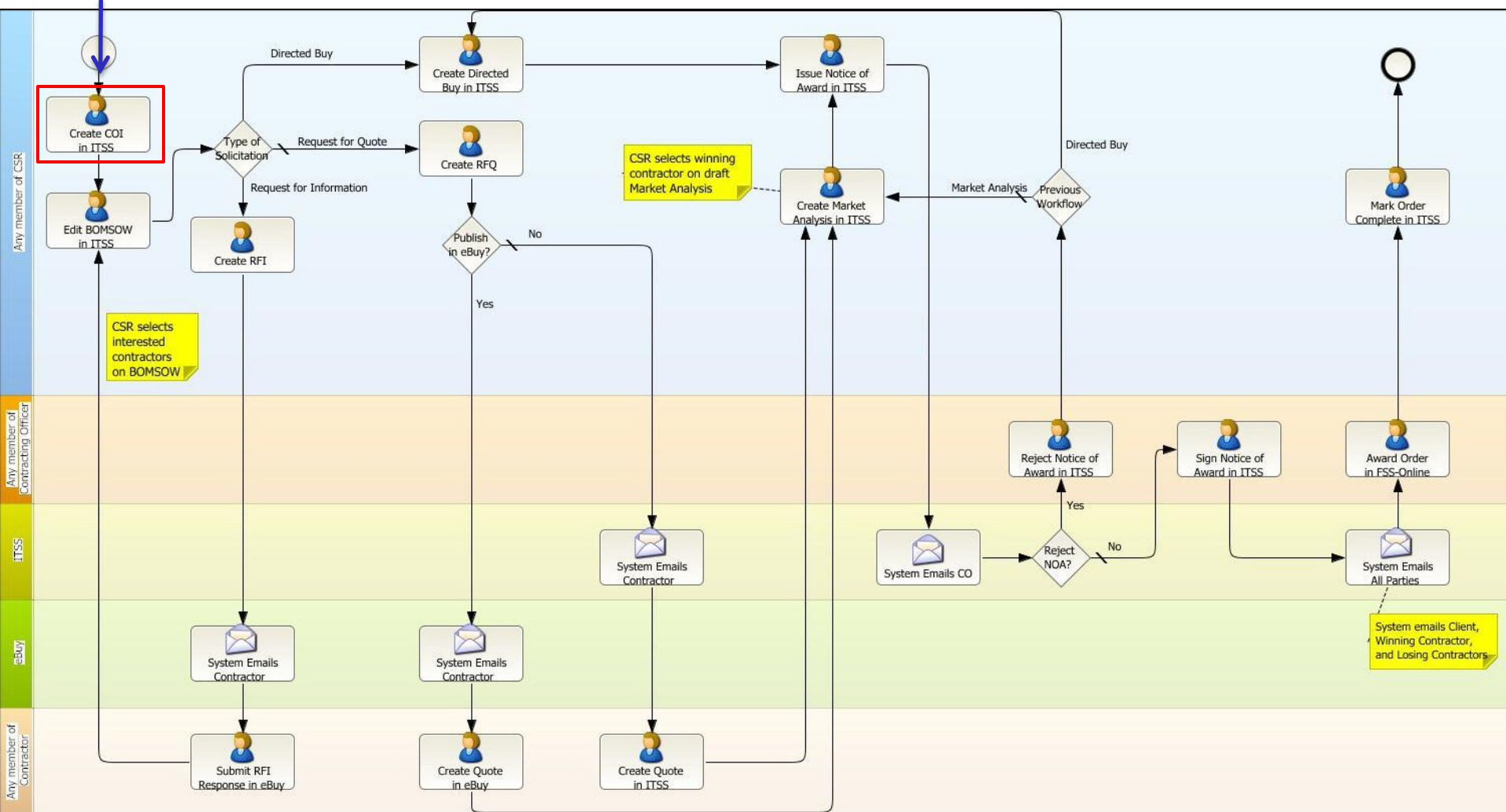
        >Notice of Award - Signed

Within the Pre-Award Workflow Context

Begin: Client contacts IWAC (outside of ITSS) seeking furniture

GSA users may create a COI by clicking on the *Create New Order* link on either the ITSS Homepage or the ITSS Orders tab.

A new page will load prompting the GSA user to select a client.

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| **WELCOME** | **ORDERS** | **FUNDING** | **REGISTRATION** | **CONTRACTS** |

Select A Client From The List Below

Enter the beginning part of the client first name and click *Go* to jump to matching client names

Go to a Specific Client: [   ] [Go]

Next ->

```
ALAN Luke ( US Army Infantry School )
AL Cora Myles ( 304th Military Intelligence Battalion ATTN ATZS-TPP-A Ft. Huachuca AZ )
ALBERT TRIPP JR. ( US Court of International Trade )
ANN TODD ( SPAWAR )
ANTONIO VIGIL ( 607th Air and Space Communications Group )
Aaron Landenberger ( SMC Space Development Group Operating Location Y )
Aaron R Schwarz ( Department of Defense )
Absenia Johnson ( Law Library of Congress )
Achille E Broenniman ( Military Sealift Command )
Adam Aasen ( 90 Communications Squadron )
```

The client list is sorted alphabetically by first name

[**Select**]

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The client list displays 30 names at a time. Use the Next / Back arrows to see more clients

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| WELCOME | ORDERS | FUNDING | REGISTRATION | CONTRACTS |

Client Order Information

Close Without Saving

👉 All Fields marked with 🟡 are required

Client Rep: Jamie Client (Test Organization)
Client Code: 179212601
Submitted By: CSR1 IWAC at 10/11/2010
Order Status: Draft

The status of the entire order

▼**Preliminary Requirements Description**

Enter a one-line description of this order for identification in views

Project Descriptor: 🟡 Furniture for R.O.B.

Estimated $ Value:

Funding Type: 🟡 REGULAR

GSA Cust Service Representative: CSR1 IWAC

Enter a description to identify the entire order

Enter the total estimated dollar value of the order (used for reporting purposes). Contractor does not see this field.

IWAC orders should leave the default *Funding Type* as-is

Client's Address Information
Client Addressing Information:

Client Agency: 🟡 00 THE LEGISLATIVE BRANCH
Client Organization: 🟡 Test Organization
Client Phone: 🟡 (858) 481-1125   Ext: 123
Client Fax: 🟡 (558) 003-0094
Address, Line 1: 🟡 1245 Schematic Ave
Address, Line 2:
City: 🟡 San Diego
State/Province: 🟡 CA
Click here for state abbreviation descriptions
Zip/Postal Code: 🟡 92126
Country: 🟡 United States

The Client's Address Information defaults to the client address on the client's user profile

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Accepting Person's Address & Contact Information
Accepting Person's Address and Contact Information:

Accepting Person: Jamie Client

E-mail Address: jamie.client@nowhere.techflow.com

Direct Phone #: (858) 481-1125 Ext: 123

Fax #: (558) 003-0094

Address, Line 1: 1245 Schematic Ave

Address, Line 2:

City: San Diego

State/Province: CA
Click here for state abbreviation descriptions

Zip/Postal Code: 92126

Country: United States

The Accepting Person's Address & Contact Info defaults to the client info on the client's user profile

If the order has multiple shipping addresses select Yes. Users can add the additional addresses on the BOMSOW.

Shipping Address or Place of Performance
If multiple ship-to addresses are required for this order, please select the option below. All references to multiple ship-to addresses should be made on the Bill of Materials or Statement of Work.

Are there Multiple Ship-To Addresses on this order? ○ Yes ⊙ No

Attention: Jamie Client

E-mail Address: jamie.client@nowhere.techflow.com

Phone: (858) 481-1125 Ext: 123

Address, Line 1: 1245 Schematic St

Address, Line 2:

City: San Diego

State/Province: CA
Click here for state abbreviation descriptions

Zip/Postal Code: 92126

Country: United States

The Shipping Address or primary Place of Performance defaults to the client info on the client's user profile

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▼GSA Order Specifics

☞ All Fields marked with 🟡 should be filled in by a GSA Representative.

Region: 🟡	30. IWAC Region ⌄
Program:	Furniture
Territory: 🟡	Arlington-VA ⌄
Order ID:	REQUISITION001
Originating Order ID:	
Originating ACT Number:	
IA Number(s):	IA-233A

IA Attachment(s):   **File Attachments:**

📌 Attach Files

Select the region and territory.

Enter the requisition number as the unique order id. Used for order identification and searching.

If the original order was split amongst multiple awards, enter the original Order ID here to relate the multiple orders

Enter the Interagency Agreement Number and/or attach a copy of the signed IA

▼GSA Order Support

☞ All Fields marked with 🟡 should be filled in by a GSA Representative.

1. Cust Svc Rep: 🟡	CSR1 IWAC ⌄
2. Cust Svc Rep:	<< Select Customer Service Rep >> ⌄
3. Cust Svc Rep:	<< Select Customer Service Rep >> ⌄
Contracting Officer:	CO IWAC ⌄
Alt Contract Officer:	<< Select Contracting Officer >> ⌄

Select the users assigned to the order. Selection of the CO is required prior to issuance of the Notice of Award.

The *Fund Manager* field is hidden on IWAC orders only.

▶ **Edit History**

Save As Draft	Submit and Proceed To BOMSOW	Close Without Saving

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The Region will default to the GSA user's **primary** region on their Registration profile. Users with access to multiple regions should be aware of their default region value and change as necessary.

Once a BOMSOW is created in the workflow, the region field is locked down and the user cannot change the value of the region.

GSA Order Specifics

All Fields marked with ● should be filled in by a GSA Representative.

Region: ● 30. IWAC Region
Program: Furniture
Territory: ● Arlington-VA
Order ID: REQUISITION001
Originating Order

The Territory will default to the GSA user's **primary** territory on their Registration profile. The Territory value is not related to the user's Region.

Users with access to multiple regions should be aware of their default territory value and change as necessary.

GSA Order Support

All Fields marked with ● should be filled in by a GSA Representative

1. Cust Svc Rep: ● CSR1 IWAC
2. Cust Svc Rep: << Select Customer Service Rep >>
3. Cust Svc Rep: << Select Customer Service Rep >>
Contracting Officer: CO IWAC
Alt Contract Officer: << Select Contracting Officer >>

▶ Edit History

Save As Draft | Subm T

On COI creation, GSA Users available for selection within the GSA Order Support fields are based on the default region.

If the creator of the COI has access to multiple regions and creates an order for a region other than their **primary** region then they will have to perform the following steps to assign roles:
1. Change the Region on the COI
2. Select *any* users in required GSA Order Support fields
3. Submit and Proceed to BOMSOW
4. Go back to COI & edit
5. Change GSA Order Support values to the correct users

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GSA Order Specifics

☞ All Fields marked with ● should be filled in by a GSA Representative.

Region: ● [30. IWAC Region ▼]

Program: Furniture

Territory: ● [Arlington-VA ▼]

Order ID: [REQUISITION001]

Originating Order ID: [ ]

Originating ACT Number: [ ]

IA Number(s): [IA-233A]

IA Attachment(s): **File Attachments:**

[Attach Files]

GSA Order Support

☞ All Fields marked with ● should be filled in by a GSA Representative.

1. Cust Svc Rep: ● [CSR1 IWAC ▼]

2. Cust Svc Rep: [<< Select Customer Service Rep >> ▼]

3. Cust Svc Rep: [<< Select Customer Service Rep >> ▼]

[▼]

[g Officer >> ▼]

▶ Edit History

Click *Save As Draft* to save the COI as a draft and fully submit at a later time

Click *Submit and Proceed To BOMSOW* to submit the COI and create a BOMSOW

Click *Close Without Saving* to revert all changes and close the COI

[Save As Draft] [Submit and Proceed To BOMSOW] [Close Without Saving]

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Next Steps…

Click Save as Draft to return to the COI later in Draft status. COIs can only be saved as draft if the status is still "Draft". If a draft COI is not modified in 30 days it will be automatically cancelled.

Submit the COI to proceed to BOMSOW
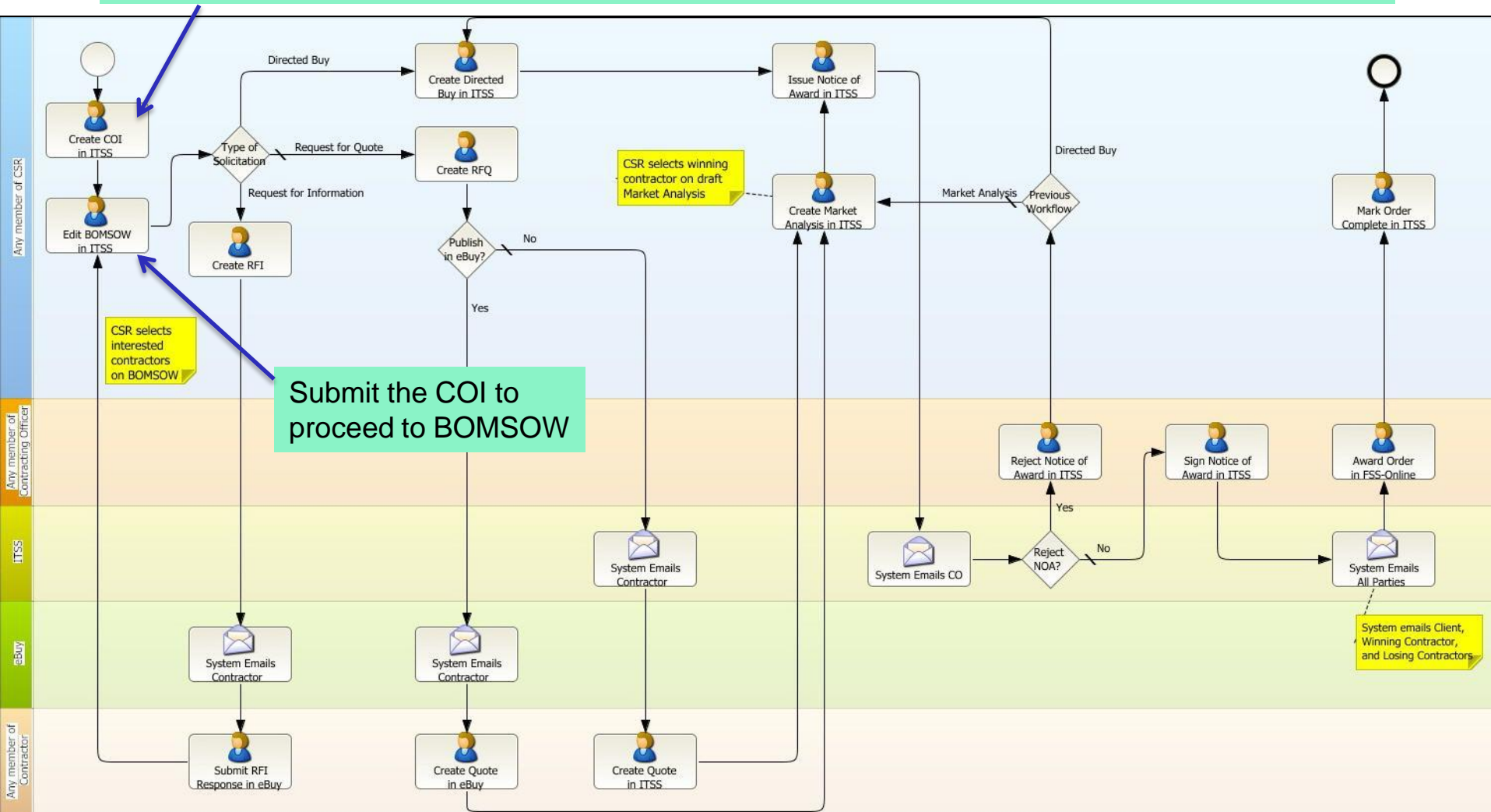
COI Status Glossary

Status	Definition
Draft	COI has been initially submitted, remains in draft status until BOMSOW is created.
GSA Evaluating	BOMSOW has been submitted for GSA Review by GSA and there is not an open RFQ.
Directed Buy	Directed Buy has been created.
RFQ	RFQ has been issued but winning quote has not yet been selected.
Quote Selected	Quote has been selected on Market Analysis.
Pending Client Acceptance	Market Analysis is pending approval from client.
Pending Approving Official Acceptance	Market Analysis is pending approval from GSA Approving Official.
Quote Accepted	Client has accepted selected Quote on Market Analysis
Approving Official Accepted	GSA Approving Official has accepted Market Analysis
Award Notice Issued	Notice of Award has been signed by the contracting officer. The order award and post-award activities will be conducted in FSS-Online.
Cancelled	Order has been marked inactive by CSR prior to a signed Notice of Award.
Complete	Order has been marked complete once the order is completed in FSS-Online.

Federal Acquisition Service

Questions & Support

➢ For questions regarding IWAC policy please contact stephen.gervasi@gsa.gov

➢ For questions regarding the RBA COI training module please contact RBA Technical Support:

- Phone: (877) 243-2889
- Email: helpdesk@gsarba.com